

infoAdvantage - WebIntelligence

For Functional Users

Presented by CGI-AMS

July 19, 2005



Agenda

- Introduction to AMS *info*Advantage
 - Terminology/Applications
- Introduction to WebIntelligence
 - Terminology
 - Login and basic navigation
 - myInfoView
 - Features
- Refresh & Download Reports
- Report Creation/Modification
 - Report Lay Out
 - Save & Share information

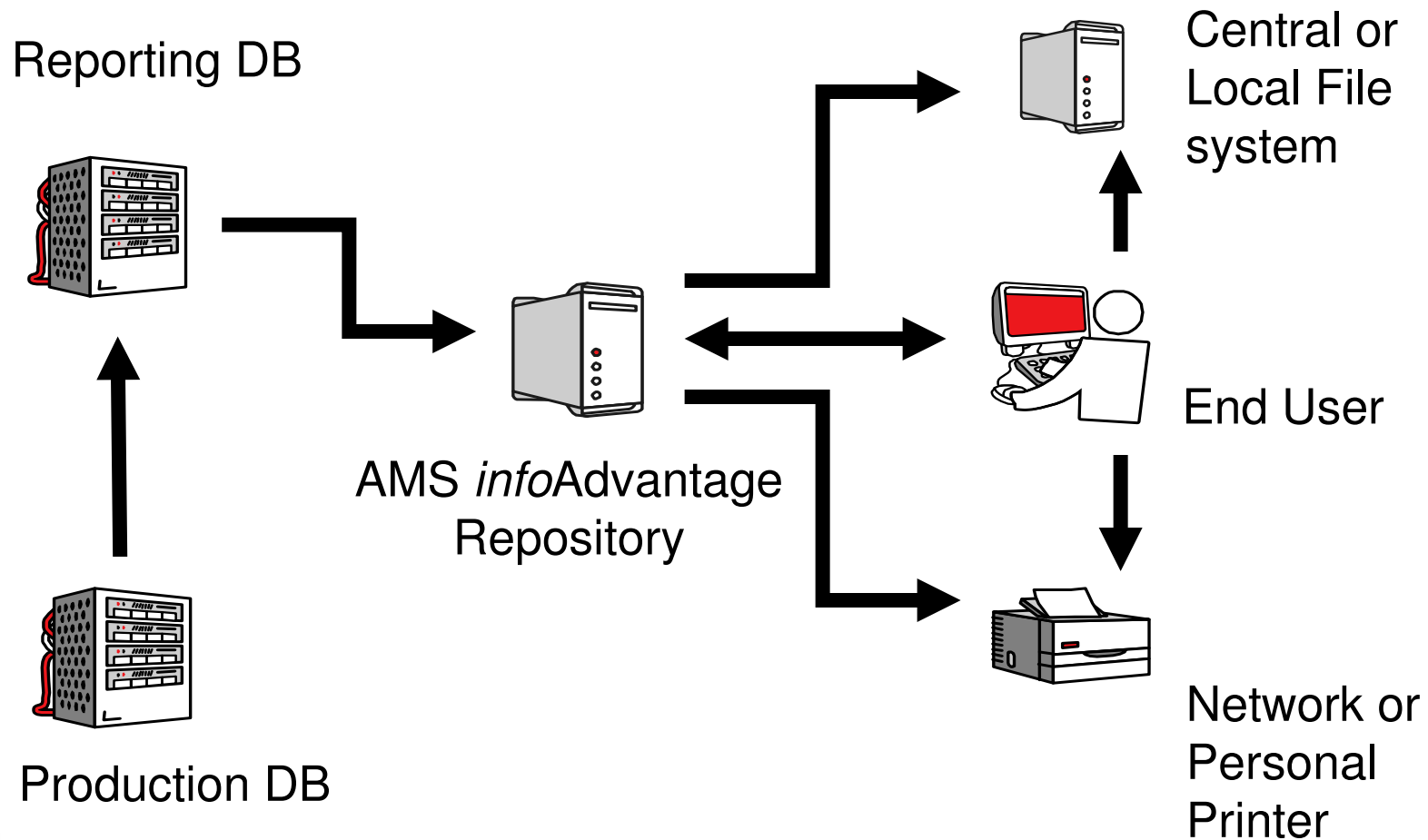


1: AMS infoAdvantage An Introduction

- READ-ONLY: never updates the database
- To create and run simple and complex queries
- Flexible report lay out
 - slice and dice, breaks, sorts, calculations
 - logos, cross tabs and charts
- Combine detail/summary information in one report
- Use any field in the Reporting Database to query or filter on



AMS infoAdvantage Technical Framework



AMS infoAdvantage Terminology

Repository:

Central storage area for

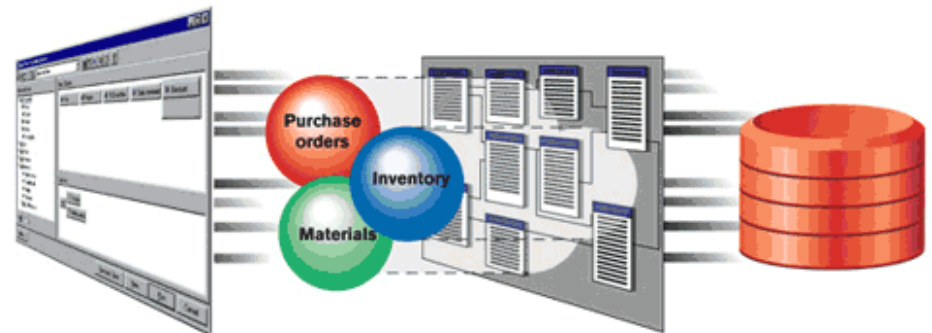
- Reports (Published or Personal)
- Universes
- Security Set Up
- Broadcast Agent (scheduler) information

Universe:

- Meta layer presents information
- Business oriented view of data
- “English”-like presentation eases report creation
- Database complexities (e.g., database table joins) hidden from report authors

Document:

- File that contains one or more reports
- Shared/Corporate: published report, accessible by all users
- Personal: user’s saved report, not shared



AMS infoAdvantage Terminology – 2

- Shared Documents
 - Standard Reports
 - Published reports accessible by other users
- Personal Documents
 - Documents saved by user
 - Not shared
 - Only user can see/use
- Inbox Documents
 - Documents directly received from other users or scheduler



AMS infoAdvantage Applications

- Supervisor
 - Set up Security and Access Rights
 - Monitor the applications
- Designer
 - Create/Maintain Universes
 - Universe: Grouping of tables. Defines what fields can be used in reports
- Business Objects Reports viewer/creator:
 - ‘Thick Client’
 - Create/Run/Schedule complex reports
- WebIntelligence:
 - ‘Thin Client’ or WebI
 - Retrieve/Run/Schedule any kind of report (‘Thick’ and ‘Thin’)
 - Create less complex reports



2: WebIntelligence – An Introduction

- Also called: WebI and 'Thin' client
- Access through Web Browser
 - No software install needed
- For Functional End Users & Technical Users
- Four components in training:
 - a) Navigation
 - i. Page layout
 - ii. Share information
 - b) Work with standard or existing reports
 - Run/Refresh/Download reports
 - c) Create new reports
 - d) Advanced functionality



a) Basic Navigation

Use different pages in AMS infoAdvantage

- Welcome
- Personalize *infoAdvantage*
- Different areas to store/retrieve documents
 - Shared documents
 - Available to all users
 - Personal and Inbox documents
 - User specific
 - Create Documents
 - Opens infoAdvantage editor



Web1 - Welcome Page

AMSinfoADVANTAGE

Welcome sa

Home Personalize Logout

Shared Documents

Personal Documents

Inbox Documents

Create Documents

Welcome to My InfoView

Welcome To My InfoView

Register yourself for the chance to win a gift. Registered users are the first in line to receive information on Business Objects product developments, training courses, and user conferences direct in their mailbox. [You can register now on our web site.](#)

My InfoView displays data from a variety of sources in a single web page. You can set up My InfoView to instantly show you the information you need by dividing the browser window into different portlets. You can display different portlets at once, each displaying different information. You can also move or delete the

Intelligence m.

AMS

Kentucky eMARS Management Administrative & Reporting System

Kentucky UNBRIDLED SPIRIT

Top navigation bar (dynamic):

- Home
 - Come back to start page
- Personalize
 - Set preferences
- Logout
 - End the session

Personalize

- Display:
 - Personalize Home Page (myInfoView)
 - Add web pages to welcome page
 - Show folders/documents when logging in
- List:
 - Set refresh options
 - Once per session
 - Every time list is accessed
- View:
 - Set view options (PDF/HTML etc)
- Edit/Create:
 - Use HTML or JAVA panel (we use JAVA)



JB9

Slide 11

JB9

Any reason why we use Java?

JB, 11/16/2004

Personalized Page

The screenshot displays the AMSinfoADVANTAGE web application interface. The top navigation bar includes links for Home, Personalize, and Logout. The main content area is divided into several portlets:

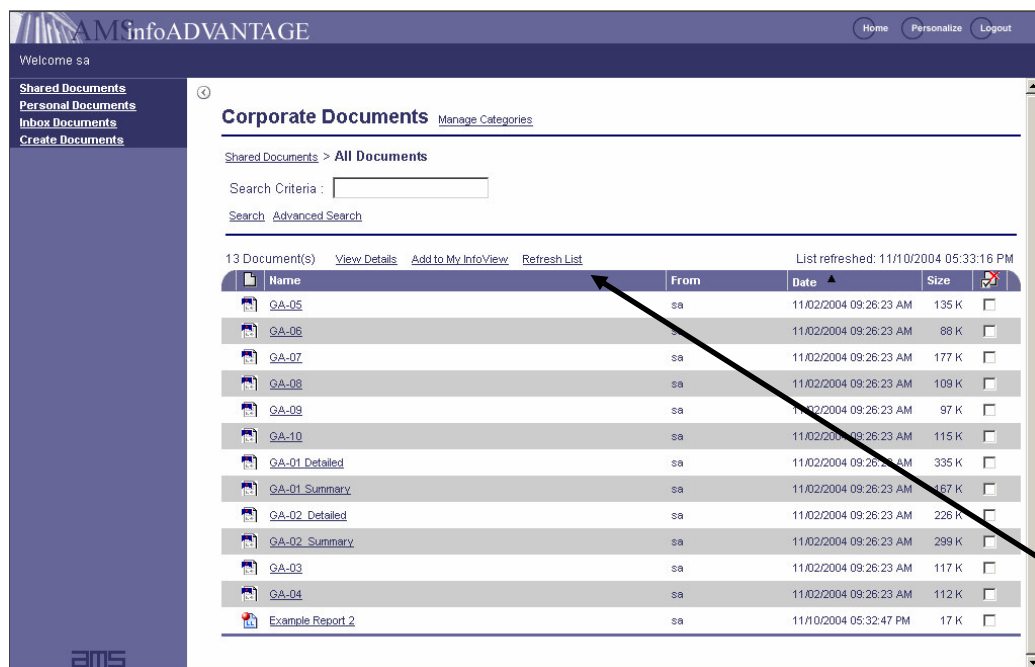
- Personal Documents:** A list of documents including Document, Example Report, Example Report 1, Example Report 2, Training Report 1, and Training Report 2.
- Web Page:** A portlet displaying a photograph of three men in business attire.
- Welcome to My InfoView:** A portlet with a globe icon and text explaining the InfoView feature, including a registration link.
- Training Report 1:** A portlet displaying a 3D bar chart with yellow bars. The y-axis is labeled with values 20,000,000 and 60,000,000. The chart shows four bars of varying heights.

The bottom of the interface features the AMS logo and a section for eMARS (Management Administrative & Reporting System).

Shared, Personal, Inbox – Common features

- This where the reports are accessed
- Manage categories
 - Display reports per category
- Search for Documents
- View Details
- Add to myInfoView
- Refresh List
 - Get the latest version of documents
 - **REMEMBER THIS ONE !!**

Shared Documents – Page view



View

- Document Type
- Report Name
- Published by / on
- Size

Delete Reports

Refresh List



GA-01 Detailed

Domain: Document

From: sa

Date: 11/02/2004 09:26:23 AM

Size: 335 K

[Edit](#) [Delete](#) [Properties](#)

View Details:

- Info for document
- Document Level Navigation

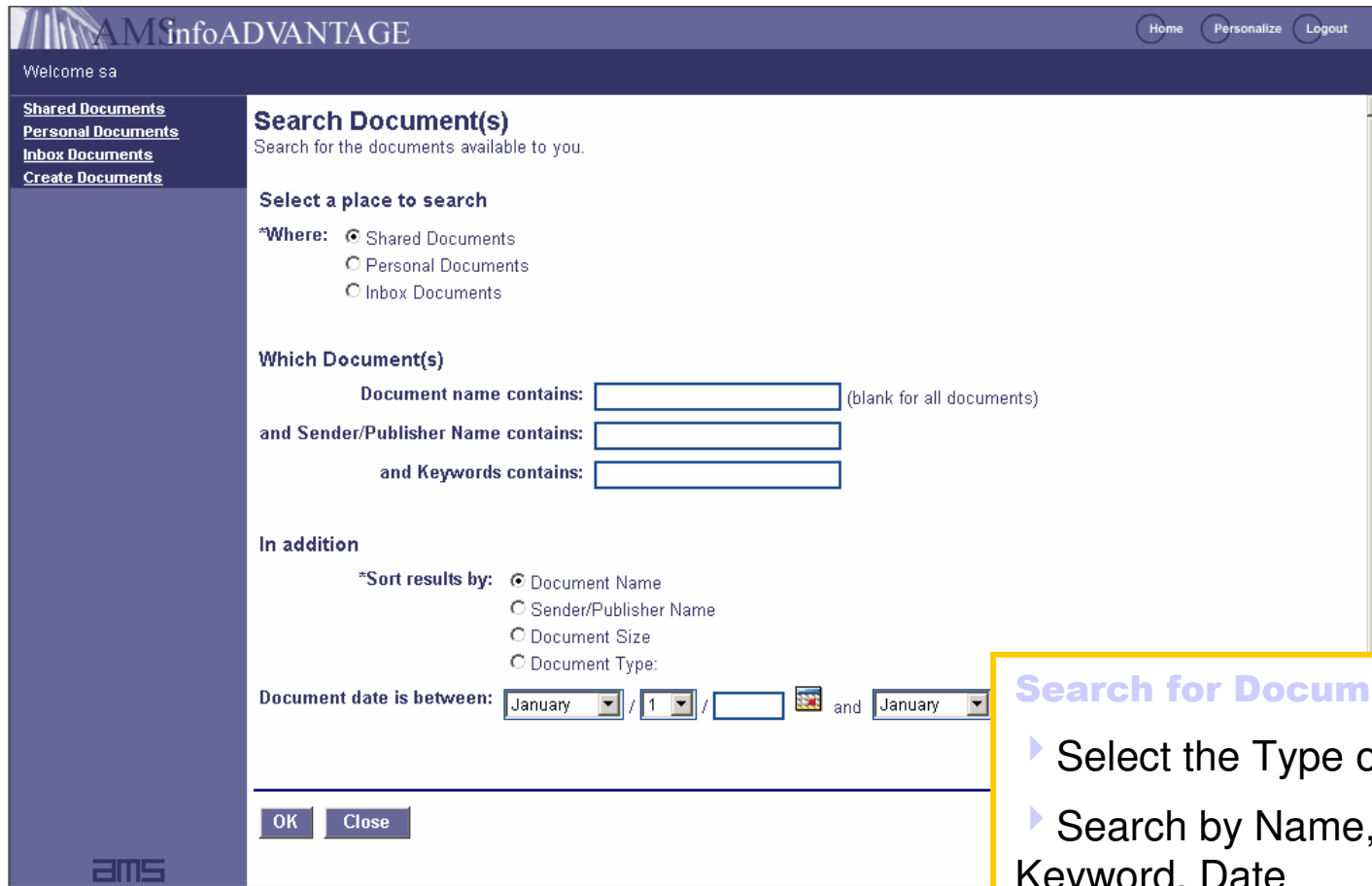


Thick Client Report



Thin Client Report

Search for Documents



The screenshot shows the AMInfoADVANTAGE web application. The header includes the logo and navigation links: Home, Personalize, and Logout. A sidebar on the left contains links for Shared Documents, Personal Documents, Inbox Documents, and Create Documents. The main content area is titled 'Search Document(s)' and includes a search bar and several filters. The 'Where' filter has three radio buttons: Shared Documents (selected), Personal Documents, and Inbox Documents. The 'Which Document(s)' section has three text input fields for 'Document name contains', 'and Sender/Publisher Name contains', and 'and Keywords contains'. The 'In addition' section has a 'Sort results by' filter with four radio buttons: Document Name (selected), Sender/Publisher Name, Document Size, and Document Type. At the bottom, there is a date range filter 'Document date is between' with dropdown menus for month and day, and a color selection icon. The interface also includes 'OK' and 'Close' buttons at the bottom left.

AMInfoADVANTAGE

Welcome sa

Shared Documents
Personal Documents
Inbox Documents
Create Documents

Search Document(s)
Search for the documents available to you.

Select a place to search

*Where: ☒ Shared Documents
☐ Personal Documents
☐ Inbox Documents

Which Document(s)

Document name contains: (blank for all documents)

and Sender/Publisher Name contains:

and Keywords contains:

In addition

*Sort results by: ☒ Document Name
☐ Sender/Publisher Name
☐ Document Size
☐ Document Type:

Document date is between: / / and / /

OK Close

Search for Documents

- ▶ Select the Type of Document
- ▶ Search by Name, Author, Keyword, Date
- ▶ Order the Search by Document Name, Author, Size, Type

Retrieve a Document

The screenshot displays the AMSinfoADVANTAGE web application. The interface includes a top navigation bar with 'Home', 'Personalize', and 'Logout' links. A left sidebar contains navigation links for 'Shared Documents', 'Personal Documents', 'Inbox Documents', and 'Create Documents'. The main content area is divided into two sections. The left section, titled 'Personal Documents', shows a search criteria field and a list of documents: 'Document', 'Example Report', 'Example Report 1', 'Example Report 2', and 'Training Report 1'. The right section, titled 'Example Report 1', displays a 3D bar chart labeled 'Example Chart' and a table with debit and posting amounts.

Example Chart

Debit Amount	Pstng Amount
293,214,284.74	14,646,395

Example Report

Example Chart

Debit Amount

Pstng Amount

- Find the document you need
- Double click on the document and it will open

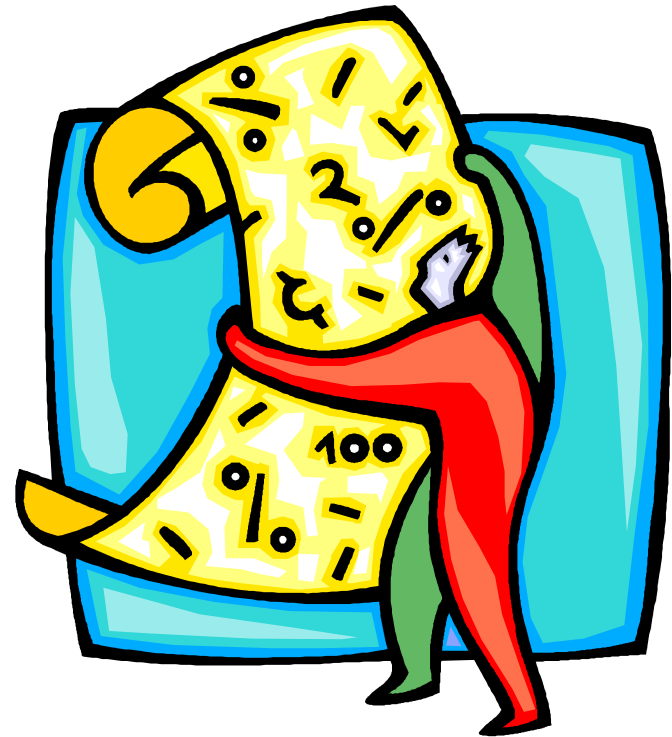
Demo 1: Navigation

- Login
- View pages:
 - Corporate
 - Personal
 - Inbox
- Search for documents
- Open Document
- Set user options
- Logout

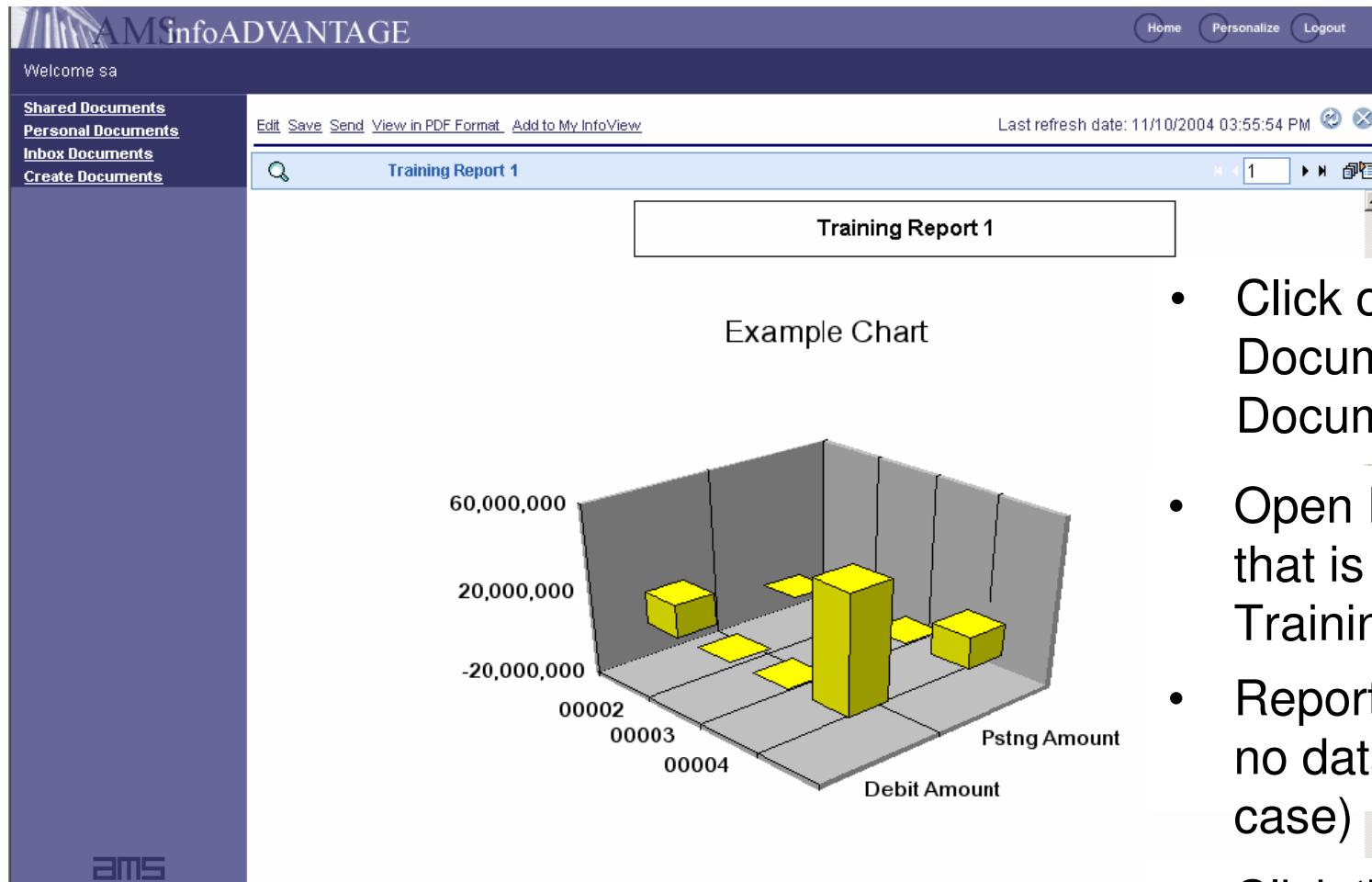


b) Work with standard or existing reports

- Retrieve a document
- Refresh to get latest (or wanted) data
- Save a document
- Download a document



Retrieve and Refresh Reports



- Click on 'Personal Documents' -> All Documents
- Open Document that is needed -> Training Report 1
- Report opens, but no data (in this case)
- Click 'Refresh' data is retrieved

Save or Download a report

Save a document

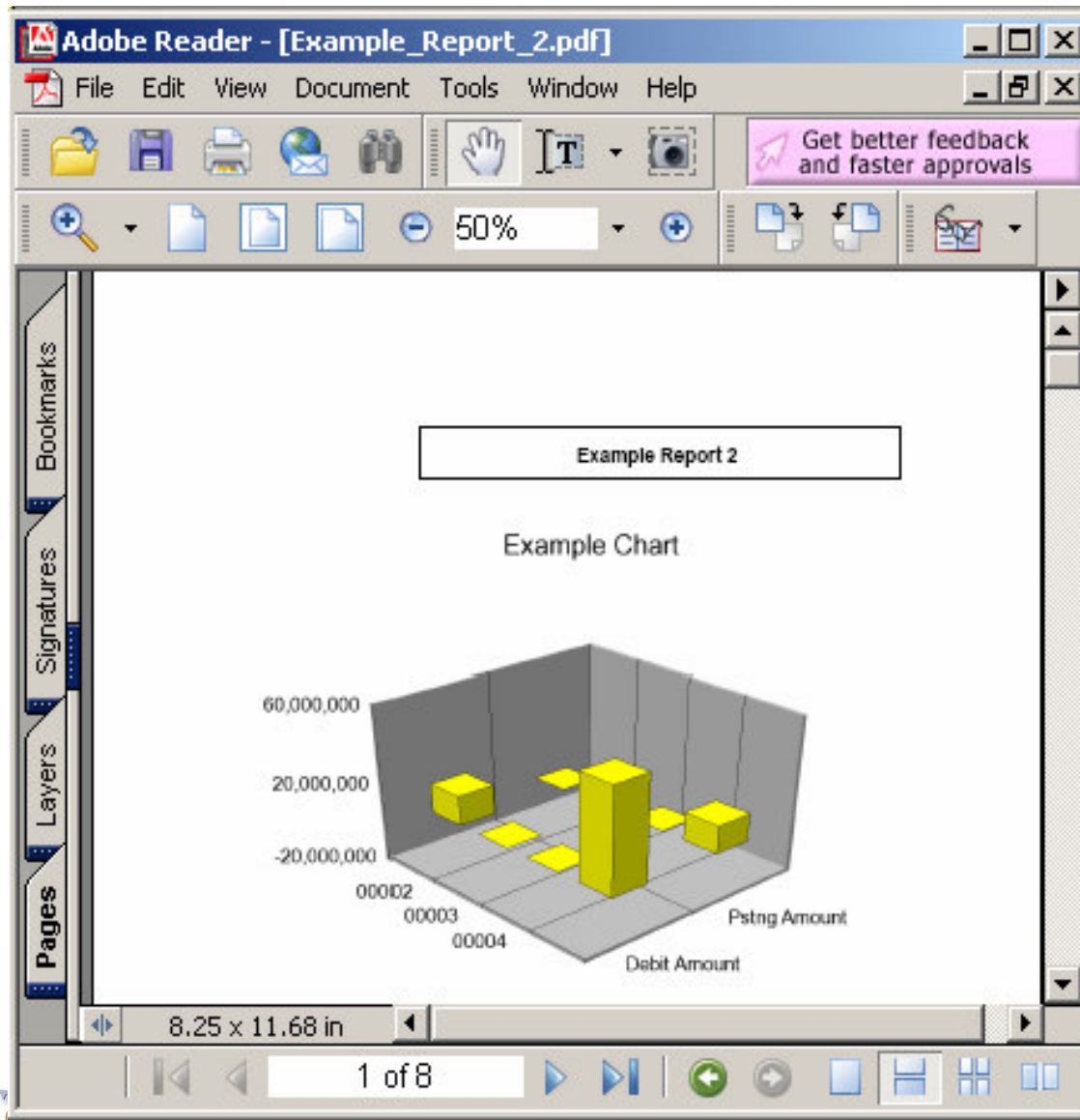
- Keep report to use later
- Share report with other users
 - Shared Documents
 - Send directly to specific users

Download Document:

- Both Thick and Thin client reports
- Locally or on Server:
 - PDF (Keeps existing formatting)
 - Excel (Keeps existing formatting)
 - Csv (Raw Data)

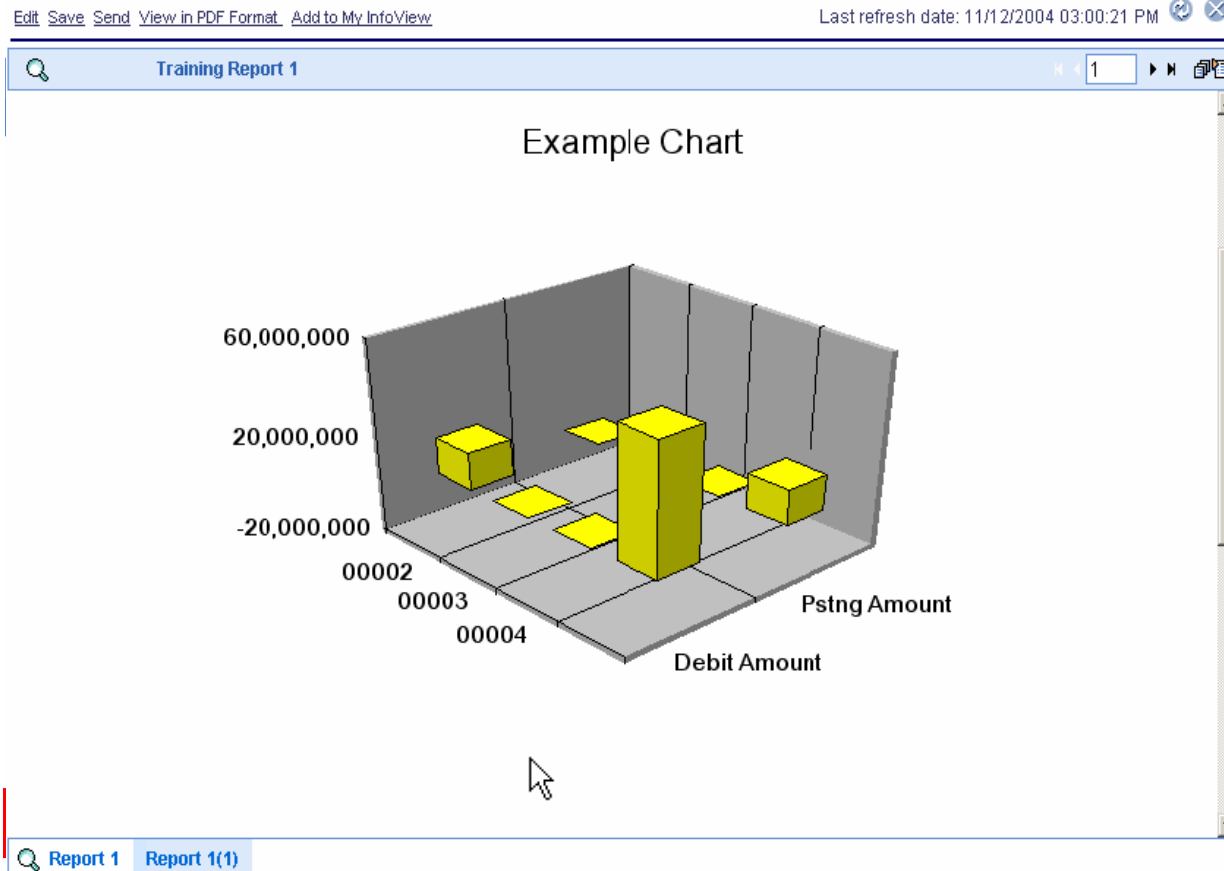





Save and Download a report



1. Open Report
2. Click on 'Save'
3. Save as Shared or Personal file in repository or
4. Download: Select format (e.g. PDF)
5. Click on Icon to save to computer
6. Open saved file

Drill down – Thin Client report



- Click  to start drill
- Click  to create snapshot
- (Back to main tab)
- Click on  to select fields
- Select values from dropdown
- Report refresh with only value selected
- Snapshot still available

Demo 2: Save/Download reports

- Open a report
- Refresh to get latest data
- Save report as PDF
- Save report as EXCEL spreadsheet
- Open outside of Business Objects



Exercise / Workshop 1

- Login to infoAdvantage
- Open a report from 'Shared Documents'
- Refresh data
- Save as PDF
- Save as Excel spreadsheet
- Open outside of infoAdvantage



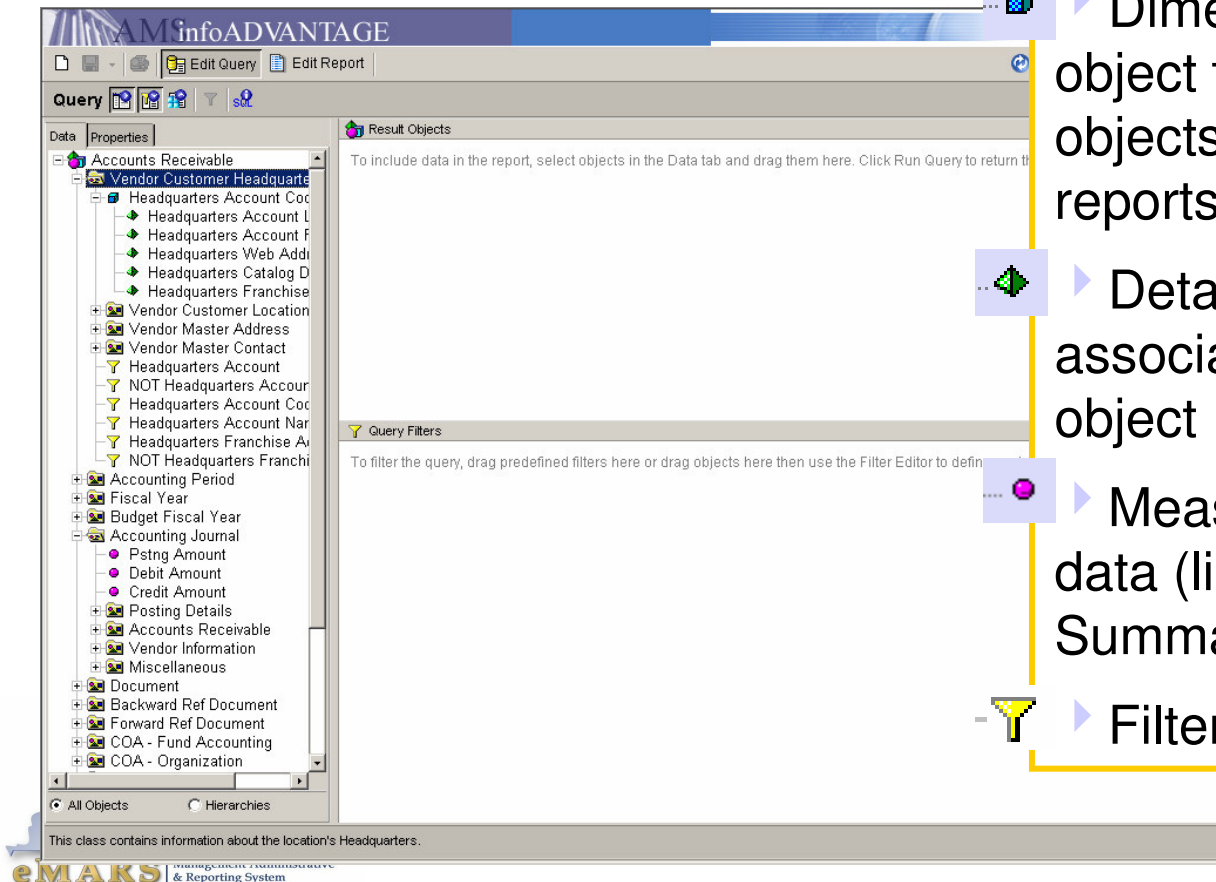
c) Create/Modify Reports

- Terminology:
 - Universe, Class, Object, Document, Query
- How to create a report:
 - Select Universe
 - Query View
 - Change the information that will be returned
 - Result fields
 - Filters/Conditions
 - Report View
 - Change report lay out
 - Filter displayed data
 - Add tables/charts/etc
 - Query View:
 - Toolbars



Universe, Class, Object

Universe shows db fields related to certain functional area.
Example: Accounts Receivable

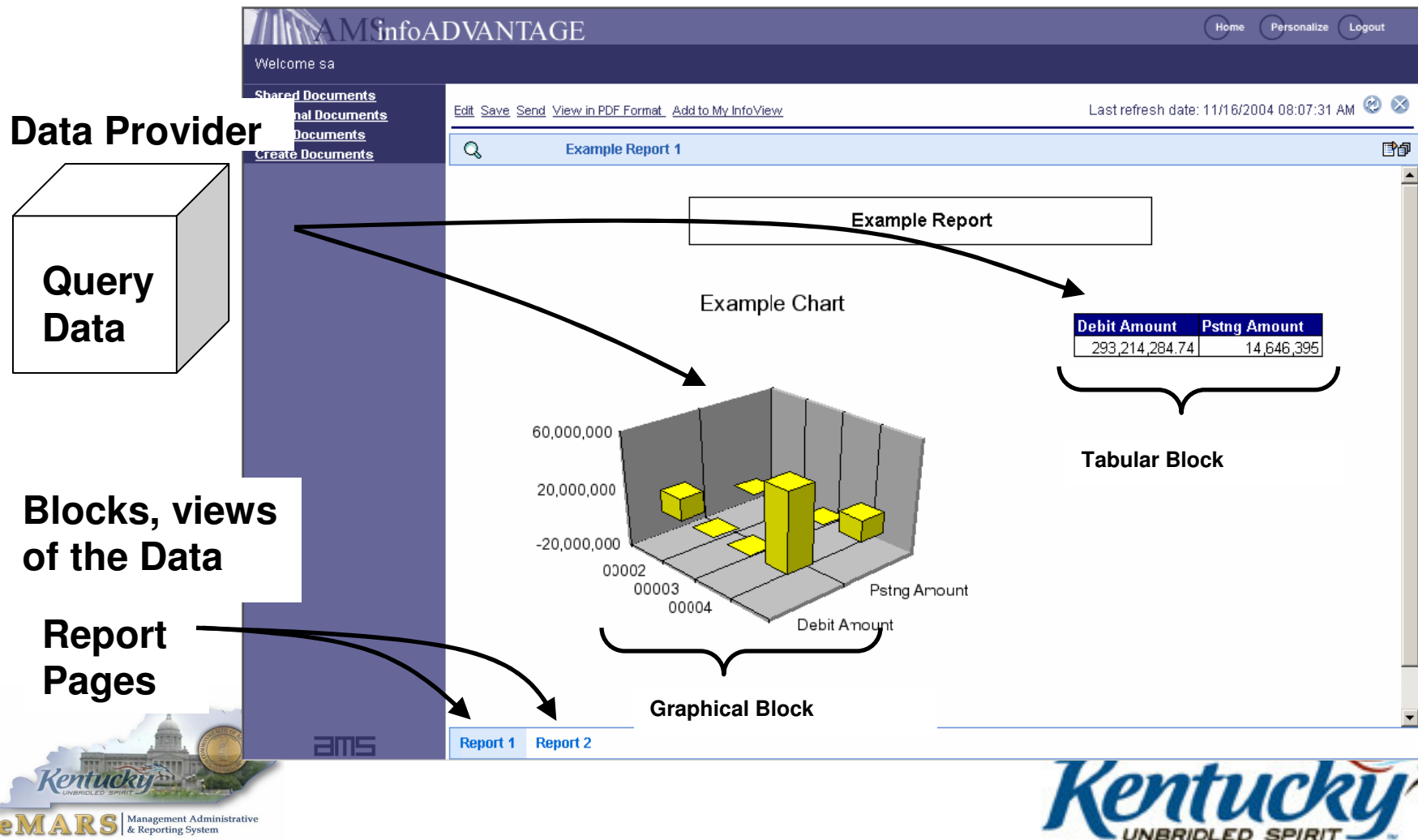


Report Objects

- ▶ Class. Contains logical groups of related objects
- ▶ Dimension object. Default object type, typically key objects, and are objects that reports will be based on
- ▶ Detail object. Always associated with a dimension object
- ▶ Measure object. Numeric data (like amounts). Summarized by default
- ▶ Filters: special kind of object

Document

Document consists of 3 main parts:



A query

- Defines the statement that will be executed against the database to return data
- Consists of:
 - Results fields
 - To be displayed in the report
 - Filters or conditions
 - To restrict data that will be returned

Filters

- Custom filters
 - Created for specific report
- Predefined filters (Quick Filters)
 - Filters defined at universe level
 - Can be used in more reports/documents
- Filter options:
 - Prompts
 - Equal to, Different from, In List etc
 - Advanced filter (subquery)



Create a Report – Step by Step

- Login to *info*Advantage
- Click on 'Create reports' link
 - List with available universes will be displayed
 - Select correct universe (based on functional area report applies to)
- Query panel will open
 - Separate window
 - This allows user to start selecting fields/applying conditions etc

Query Panel

New doc
and save

Report edit or query edit

Run query,
purge data, help

Objects
&
Classes

View SQL

Results Fields

- ♦ Reports Edit: edit the way data is displayed
- ♦ Query Edit: edit what data will be returned (SQL level)

Build the query - 1

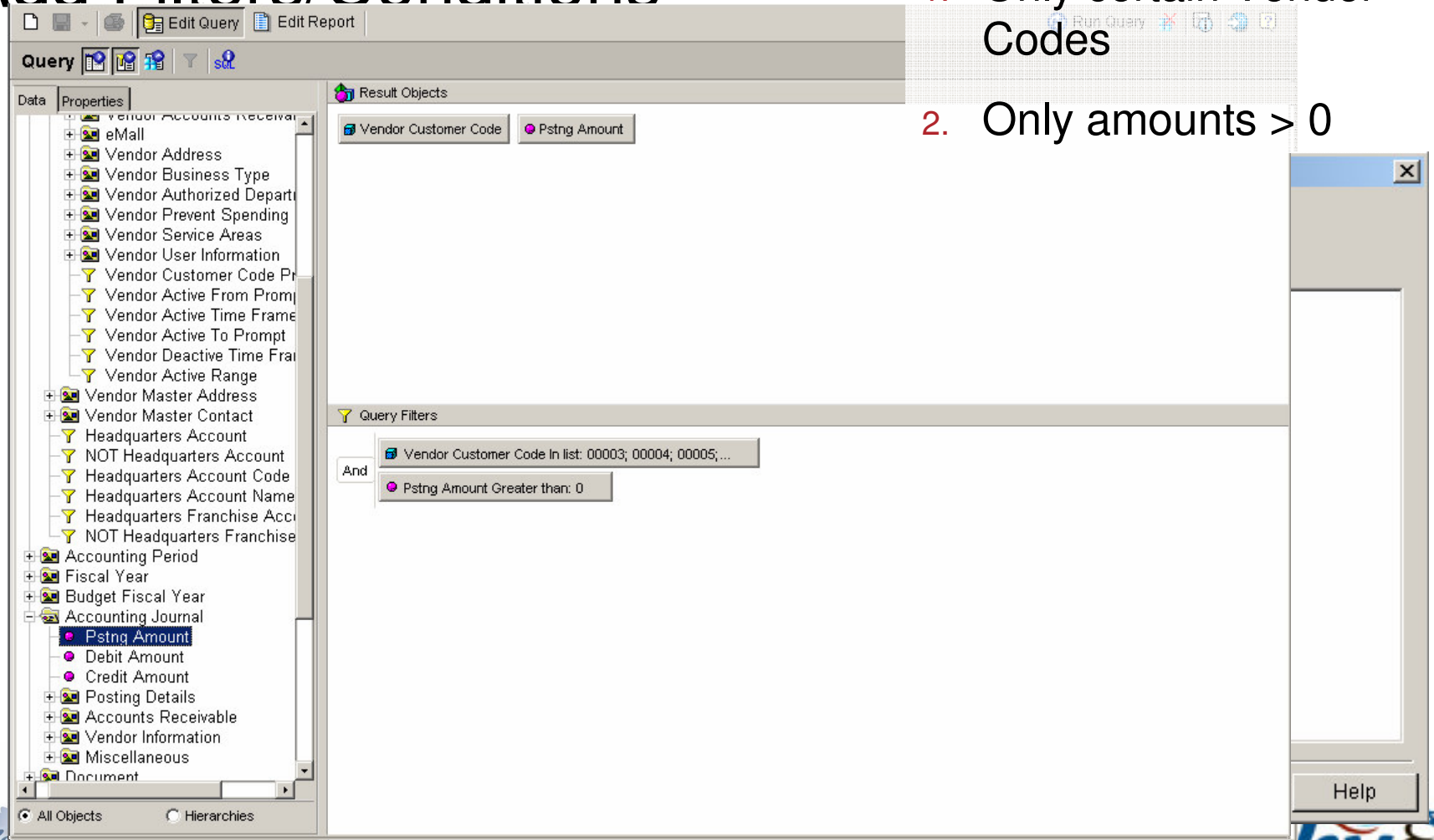
Add results fields: 'Double click' or 'Drag and Drop'

The screenshot shows the AMSinfoADVANTAGE software interface. The 'Query' window is open, displaying a tree view of data sources on the left. The 'Data' tab is selected, showing a list of objects including 'Accounts Receivable', 'Vendor Customer Headquarters', 'Headquarters Account Code', 'Vendor Customer Location', 'Vendor Customer Code', 'Names', 'Options', 'Organization', 'Remittance Advice', 'Vendor Terms', 'Vendor Accounts Receivable', 'eMail', 'Vendor Address', 'Vendor Business Type', 'Vendor Authorized Department', 'Vendor Prevent Spending', 'Vendor Service Areas', 'Vendor User Information', 'Vendor Customer Code Prefix', 'Vendor Active From Prompt', 'Vendor Active Time Frame', 'Vendor Active To Prompt', 'Vendor Deactive Time Frame', 'Vendor Active Range', 'Vendor Master Address', 'Vendor Master Contact', 'Headquarters Account', and 'NOT Headquarters Account'. The 'Result Objects' pane on the right is empty, with instructions to drag objects from the Data tab. The 'Query Filters' pane at the bottom is also empty. The status bar at the bottom shows 'Last Refresh Date: November 16, 2004 11:08:03 AM' and 'The dollar amount posted to the journals as a result of a transaction.'

Build the Query – 2

Add Filters/Conditions

1. Only certain Vendor Codes
2. Only amounts > 0



Run the Query

The screenshot displays the AMS infoADVANTAGE Business Objects interface. The top menu bar includes 'Edit Query' and 'Edit Report'. The 'Report' tab is active, showing a 'Report Title' placeholder. The left pane shows a tree structure with 'Document', 'Objects', 'Vendor Customer Code', 'Pstng Amount', and 'Variables'. The main area displays a table titled 'Vendor Custome Pstng Amount' with the following data:

Vendor Customer Code	Pstng Amount
00003	12,500.9
00004	4,201
00005	27.87
00011	300
00012	2,000

The bottom status bar shows 'Report 1' and 'Last Refresh Date: November 17, 2004 9:39:16 AM'.

Edit Report

- Data returned is good, display is not so great
- WebIntelligence allows you to
 - Apply Breaks
 - Create Title Cell
 - Add calculation
 - summation/average/etc
 - Convert data into chart, additional table

Edit Report

Edit Report, Not Query

infoADVANTAGE

Report Title

Vendor	Customer	Pstng Amount
00003		12,500.9
00004		4,201
00005		27.87
00011		300
00012		2,000

- Edit the way the data is displayed.

• Example:

- Add Title
- Add Summation

- ♦ Data: Drag and drop to create new tables
- ♦ Templates: Add tables/charts/cells
- ♦ Properties: Edit particular table/cell
- ♦ Map: Links to different reports and elements in report

Edit Report – Add Title

- Double click on Title Cell
- Type Title wanted, check formula
- Additional cells:
 - Templates
 - Drag and drop cell
 - Modify lay out (right mouse click) or formula

AMInfoADVANTAGE

Report 1

11/17/04

Posting Amount per Vendor

Vendor Customer Code	Pstng Amount
00003	12,500.9
00004	4,201
00005	27.87
00011	300
00012	2,000

Last Refresh Date: November 17, 2004 9:39:16 AM

Lucky UNBRIDLED SPIRIT

Edit Report – Add Summation

The screenshot shows the AM InfoADVANTAGE software interface. The main window displays a report titled "Posting Amount per Vendor" for the date 11/17/04. The report is structured as a table with two columns: "Vendor Customer Code" and "Pstng Amount". The data rows are as follows:

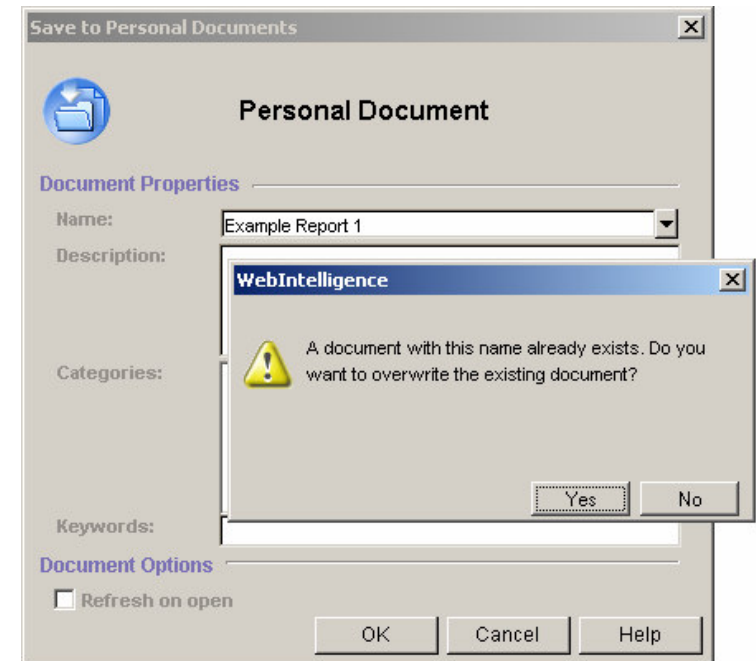
Vendor Customer Code	Pstng Amount
00003	12,500.9
00004	4,201
00005	27.87
00011	300
00012	2,000
Sum:	19,029.77

The "Sum:" row is highlighted with a red box, indicating the summation has been added. The software interface includes a menu bar with options like "Data", "Templates", "Properties", and "Map". A toolbar at the top contains icons for "Edit Query", "Edit Report", "Refresh Data", and "View Structure". A sidebar on the left shows a tree view of the report structure, including "Document", "Objects", "Vendor Customer Code", "Pstng Amount", and "Variables".

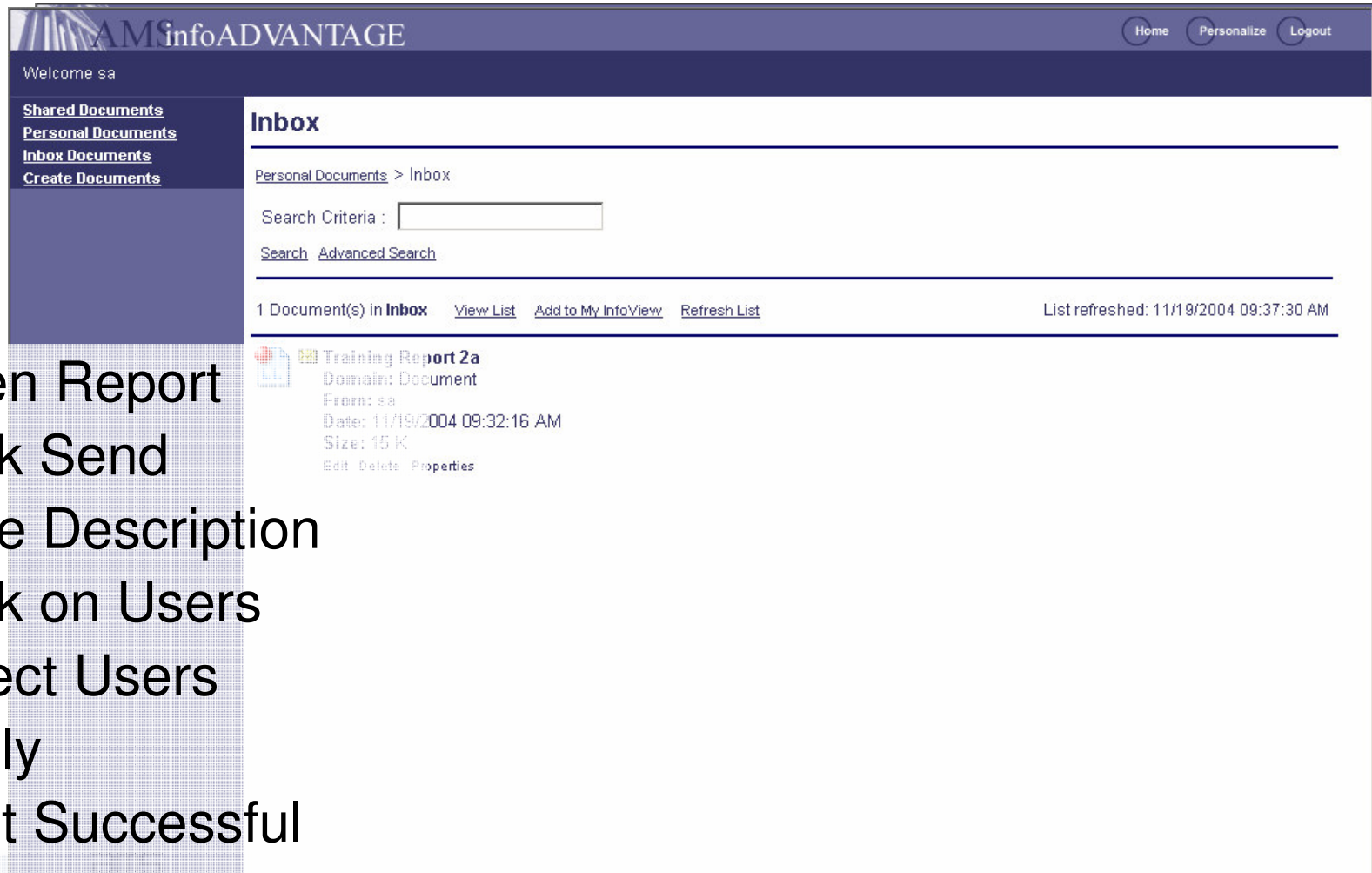
- Select Cell that summation is needed for
- Click on Σ Sign
- Summation is added

Save Report

- Different options to save a report:
 - With or without data
 - In repository:
 - Shared
 - Personal
 - On users computer
 - Excel spreadsheet
 - PDF
- When saving to repository: user will be prompted if document with same name already exists
- To Print: export as PDF then print



Send Report to other users



- Open Report
- Click Send
- Type Description
- Click on Users
- Select Users
- Apply
- Sent Successful
- Shows up in Inbox

Demo 3: Create a report

- Login
- Create Report
 - Select fields to be displayed
 - Create conditions
 - Run Query
- Save Report
- Add Summation and Title
- Save Again
- Logout



Exercise / Workshop 2

- Create a new report
 - Use Accounts Receivable universe
 - Select following fields:
 - Headquarters account code
 - Debit amount
 - Run query
- Change lay out
 - Modify title
 - Add summation
- Save report
- Send report to other user.
Verify that it was received
- Add filters to restrict data
 - Example: only Debit amounts between 0 and 10,000 dollar



Questions

